MaxOutlook™

Manual

MAX Communication Server Release 6.7 Update 1

March 2013

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AltiGen Communications, Inc.
410 East Plumeria Dr.
San Jose, CA 95134
Telephone: 888-AltiGen (258-4436)
Fax: 408-597-9020
E-mail: info@altigen.com
Web site: www.altigen.com

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About MaxOutlook

MaxOutlook is a version of AltiGen's MaxCommunicator call management software. MaxOutlook is integrated into Microsoft Outlook (Outlook 2007 or 2010). It runs with MAX Communication Server ACC or ACM 6.7 or later systems. MaxOutlook users can access, configure, and perform several of the system's PBX functions directly from within Outlook, including call handling, call forwarding, voice messaging, extension monitoring, conferencing, and One Number Access.

Like MaxCommunicator, MaxOutlook allows you to obtain phone numbers to dial from a Microsoft Outlook Contact list. MaxOutlook also lets you see the incoming calls that have a matching record in the Contact list. You must set up the Outlook Contacts list prior to using this feature.

Note: Unlike MaxCommunicator, MaxOutlook does not support Outlook Express, ACT! or GoldMine® contact management

Licensing

The following AltiGen licenses are required:

- MaxOutlook requires a MaxCommunicator seat license for each user, or a MaxCommunicator session license.
- The IPTalk feature requires an IPTalk license for each user, or an IPTalk session license.
- MaxCall requires a MaxCall seat license for each user or a MaxCall session license.

A system administrator can assign and verify seat licenses in MaxAdministrator by selecting **License > Client SEAT License Management** from the main menu.

Limitations

- After installing MaxOutlook, launch Outlook right away to enable MaxOutlook, otherwise MaxOutlook might not load. MaxAgent and/or MaxCommunicator *must not be running* while you do this.

- If you also use MaxCommunicator and/or MaxAgent, and Outlook integration is enabled in those programs (in their **Configuration > Integration** screen), *always* open Outlook first, before opening MaxCommunicator or MaxAgent. Otherwise MaxOutlook may not load.

  For example, suppose you don't want to run Outlook in a given session or period of time but you *do* open MaxCommunicator and/or MaxAgent, and then later you need Outlook. Before opening Outlook, you must close MaxCommunicator and MaxAgent completely, or MaxOutlook may not load. After Outlook is open, you may again open MaxAgent or MaxCommunicator.

Installation

The client system must meet the following minimum requirements.

- IBM/PC AT compatible system
- 2 GHz CPU or above
- Windows XP Professional or Windows Vista Business Edition SP 1 (32-bit or 64-bit) or Windows 7 (32-bit or 64-bit)
- 2 GB available hard drive disk space
- 512 MB RAM
- SVGA monitor 1024 x 768 (or 800 x 600) with 256 color display, or better
- Keyboard and mouse
- A sound card in the computer, if using IPTalk
- MAX Communication Server ACC 6.7 or MAX Communication Server ACM 6.7 running on a server accessible to this client.
- Microsoft Outlook 2007 or 2010 installed

Note: The 64-bit version of Microsoft Outlook is not supported.

Pre-Installation Checklist

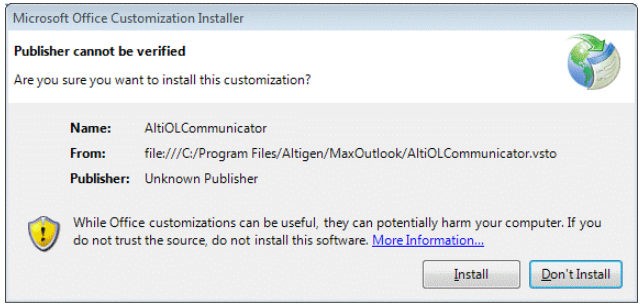
Before installing MaxOutlook, make sure the following is done:

- MAX Communication Server ACC 6.7 or MAX Communication Server ACM 6.7 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxOutlook has local or domain administrator rights on the client computer.
- The extension affiliated with the client PC has a MaxCommunicator Seat License assigned to it, or there is a MaxCommunicator Session License installed in the MAXCS system.
- Outlook 2007 or 2010 is installed on the client computer

Installing MaxOutlook on a Client System

When the above items are done, follow these steps on the client machine:

1. Close all Windows applications.
2. Insert the MAX Communication Server 6.7 Clients CD into the CD ROM drive.
3. Open the **MaxOutlook** folder on the CD, and run the **Setup** program, following the instructions on the screen.
4. When installation is complete, launch Microsoft Outlook. A message may prompt whether to install this customization.


Microsoft Office Customization Installer
Publisher cannot be verified
Are you sure you want to install this customization?
Name: AltiOLCommunicator
From: file:///C:/Program Files/Altigen/MaxOutlook/AltiOLCommunicator.vsto
Publisher: Unknown Publisher
While Office customizations can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. More Information...
Install
Don't Install

5. Click **Install**. MaxOutlook completes its installation.

Alternative installation: If your system administrator has loaded MaxOutlook on a shared network server, you can copy the files in the MaxOutlook folder to your desktop computer, and run the MaxOutlook **Setup** program.

Uninstalling MaxOutlook

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > MaxOutlook 6.7** to uninstall MaxOutlook.
2. Click **Remove**, and respond to any additional prompts.

Automatic Upgrade

Each time you start up MaxOutlook, a comparison is made with the version of MAX Communication Server ACC/ACM that is running on the server. If updates were made on the server, and your version of MaxOutlook is out-of-date, you are prompted for upgrade permission. If you automatically upgrade, the MaxOutlook startup is terminated and a software upgrade session is started. Restart MaxOutlook to run the newer version.

Note: For remote MaxOutlook users outside the firewall, TCP port 10050 is required to be open to allow automatic upgrade. Automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, which may take some time, to perform the automatic update.

Downgrade Procedure

1. Go to **Control Panel** > **Add/Remove Programs** and remove MaxOutlook 6.7 and ALL OTHER 6.7 client applications (including MaxCommunicator, MaxSupervisor, MaxAgent, AltiConsole and CDR Search).
2. Reboot your system.
3. Install the earlier MaxOutlook software, as appropriate.

Getting Started

Start Microsoft Outlook.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet service provider. If you're using a low-speed connection, the login may take some time, since a large amount of data is transferred to your desktop.

Note: For users running Windows XP SP2, a firewall protection Security Alert may pop up when opening the login window. If this happens, click **Yes** to allow MaxOutlook to run.

The MaxOutlook login screen appears.

Logging In

1. If this is your first login to this MAX Communication Server ACC/ACM system, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your system administrator.

(Subsequently, when you log in, you'll see the IP address in the **Server Name** field. You may use the drop-down list to select a different server, if more than one server is available.)

2. Enter your **Extension** number and **Password** assigned to your phone. (You can also log in as a workgroup or a huntgroup.)

   If you want to store your login password and have it entered automatically the next time you log in to MaxOutlook, check the **Always save password** check box.

   Note: Up to eight unsuccessful login attempts are allowed, after which login will be disabled for from 1 to 24 hours (depending on the duration set by your system administrator).

3. If your extension is an IP extension and you will be using a headset, check the **Enable IPTalk softphone** option. (An AltiGen IPTalk license must be assigned to your extension.)

   (Even if you do not have an IP *phone*, as long as your extension is set up as an IP extension by your system administrator, you can check the **Enable IPTalk softphone** check box.)

   See "Logging In Remotely" on page 8 for more information on using IP extensions remotely.

4. If you will be using MaxCall and a MaxCall license is assigned to your extension, check **Enable MaxCall**. (MaxCall is described in "Using MaxCall" on page 65.)

5. Click **Sign In** or press the Enter key. To back out of signing in, click **Cancel** or press the Esc key.

Logging In Remotely

You can use MaxOutlook from a remote location if

- MaxOutlook and Microsoft Outlook are installed on your remote computer
- Your extension is configured as an IP or mobile extension by your system administrator
- You have an AltiGen-certified IP phone or are using IPTalk

Consult your system administrator or authorized AltiGen dealer for details on obtaining this equipment.

All the call handling functions are the same as when you log in locally, with the exception of the ability to configure One Number Access. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop PC, and even receive phone calls as you would at the office.

To log in from a remote location,

1. If you connect to the Internet through a modem connection, establish a connection to your internet service provider (ISP).
2. Start Microsoft Outlook and, when the MaxOutlook login screen appears, log in to MaxOutlook using your **Extension** and **Password** as usual.
3. If you will be using a headset plugged into your PC, check the **Enable IPTalk softphone** check box. (An AltiGen IPTalk license must be assigned to your extension.)
4. Click **OK.**

IP Extensions Using IPTalk

An AltiGen-certified USB headset system is recommended for IP extensions using IPTalk (your phone system administrator or AltiGen dealer can recommend headsets).

Important: You can run only one instance of MaxOutlook with IPTalk per system.

To make and receive calls using IPTalk,

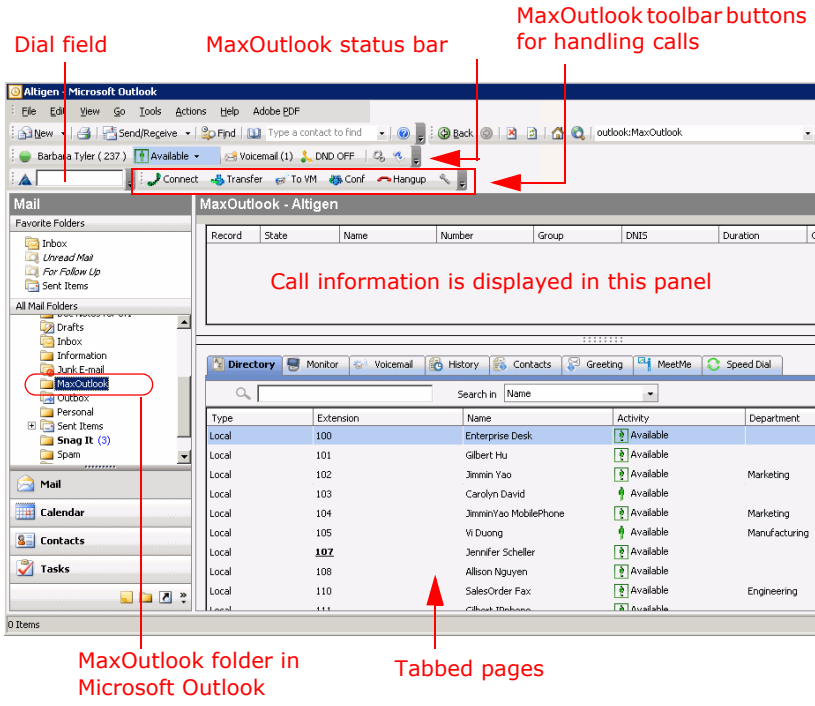
1. Connect your headset to your computer.
2. Use the MaxOutlook dialing and call accepting functions as usual to make and receive calls.

When Connection Is Broken

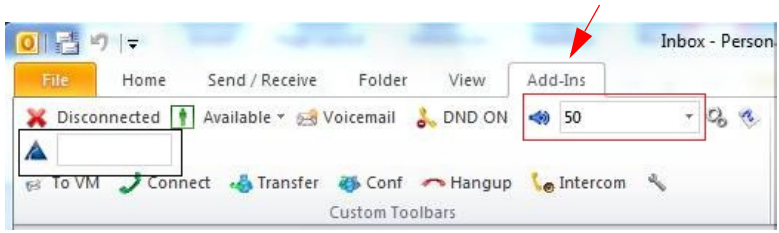
When a connection with the phone server is broken, a message box pops up asking if you want to connect again. Click **Yes** to restore the connection without having to go through the log-in process again.

Overview of the Main Window

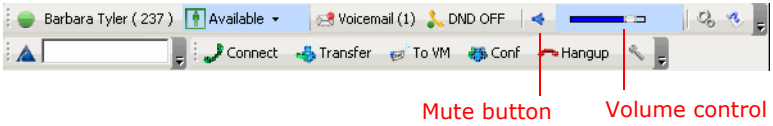
After you log in to MaxOutlook, Microsoft Outlook displays the MaxOutlook status bar and call handling toolbar and the Microsoft Outlook folder you were last working in. If that was not MaxOutlook, then click the **MaxOutlook** folder to switch to the MaxOutlook screen.


Dial field
MaxOutlook status bar
MaxOutlook toolbar buttons for handling calls
Call information is displayed in this panel
MaxOutlook folder in Microsoft Outlook
Tabbed pages

If you are running Outlook 2010, you will find all of the call controls on the **Add-Ins** tab.



If you checked **Enable IPTalk** when you logged in, two more buttons on the status bar let you mute the call and control the volume.



Note: If you are running Outlook 2010, you will adjust the volume by clicking the arrow and choosing a volume level from 0 (muted) to 100 (loudest).

You can customize the MaxOutlook display: select the toolbar buttons, columns, and tabs you need and their order of appearance; and sort columns in ascending or descending order. See “Customizing the Display” on page 17.

Status Bar

From the status bar you can do the following:

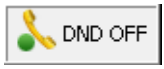
- See the extension you’re logged into.

  When a call is ringing your extension, the green ball changes to red and the caller’s name (if available) and number appears.

- Change your activity state from the drop-down list. (See “Changing Activity Status” on page 15.)

- See the number of unopened voice mails. Click this button to open the **Voicemail** tab.

- Turn Do Not Disturb (DND) on and off. (See “Turning Do Not Disturb On and Off” on page 16.)



- If you're using IPTalk, you can mute the call (using the **Mute** toggle button) and control the volume using the volume control.

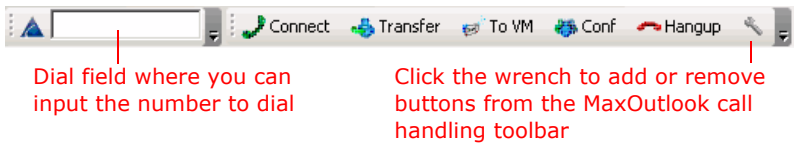
- Configure MaxOutlook. (See "Configuring MaxOutlook" on page 47.)

- Open help.

Call Handling Toolbar

MaxOutlook's call handling toolbar provides:

- A **Dial** field where you input the number to dial
- Buttons to connect, transfer, send a call to voicemail, conference, hangup, send a call to **AA** (auto attendant), flash, record, redial, hold, intercom, and enter an account code


Connect
Transfer
To VM
Conf
Hangup
Dial field where you can input the number to dial
Click the wrench to add or remove buttons from the MaxOutlook call handling toolbar

Note: If you are running Outlook 2010, you will find all of the call controls on the **Add-Ins** tab.

You can choose the buttons you want and the order in which you want them. See "Customizing the Display" on page 17.

Call Information Panel

The call information panel displays several columns of information about calls:

Record— shows when a call is being recorded

State—the state of the currently active call:

- **AA**—the call is being transferred to an auto attendant
- **Busy**—callee is busy or not available
- **Call Pending**—the call is placed into a workgroup queue
- **Conference**—the call is in conference
- **Connect**—the call is connected
- **Dial Tone**—a dial tone is present, and MaxOutlook is ready to dial out
- **Error**—receipt of an error tone
- **Hold**—the call is on hold
- **Hold Pending**— the call is being transferred or conferenced
- **Idle**—the extension is not in use
- **Play VM**—playing voice mail (The **Duration** field displays the duration of the voice mail as it plays. The duration display does not reflect fast forward or rewind.)
- **Record**—recording an introductory message
- **Ringback**—caller sees this state while the callee's phone is ringing
- **Ringing**—an outgoing call is ringing another phone or an incoming call is ringing your phone

Name—the name of the person on the other end of the call, if available

Number—the phone number at the other end of the call

Group—your workgroup number for this call

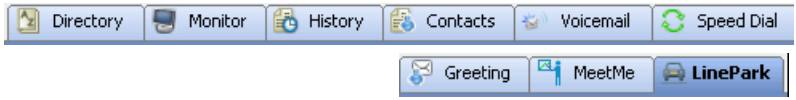
DNIS—the DNIS number, if appropriate

Duration—duration of the call

Conference—indicates the conference host

Tabbed Pages

Nine tabbed pages are available on the bottom half of the MaxOutlook screen: Directory, Monitor, History, Contacts, Voicemail, Speed Dial, Greeting, MeetMe, LinePark. (If you have enabled MaxCall, the MaxCall tab is available also. MaxCall requires a license and is discussed in "Using MaxCall" on page 65.)



Directory—Lists the extensions of people at the company. Columns include: Type (local, remote), Extension, Name, Activity, Department, Location.

Monitor—A list of extensions you have chosen to monitor. Columns include: State, Extension, Name, Activity, DND/FWD, Caller Name, Number, Department, Location, DNIS, and Duration. See “Monitoring the Activity of Other Extensions” on page 42.

History—A history of your incoming, outgoing, and missed calls. Columns include: Direction (incoming, outgoing, missed), Number, Name, Date/Time, Duration, DNIS, Group, and Note.

Contacts—A list of contacts you have added to your MaxOutlook. Columns include: Name, Company, Business Phone, Mobile Phone, Email Address, IM Address, Home Phone. You can right-click on a contact to pop up the contact’s information in Microsoft Outlook.

Voicemail—A log of unopened and opened voice mails left at your extension. Columns include: Type, Number, Caller Name (if available from extension information or from an external database), Date/Time, Duration, and Note. See “Dealing with Voice Mail” on page 39.

Speed Dial—A list of speed dial numbers entered by the system administrator and entered at the extension. Columns include: Type (extension speed dial or system speed dial), ID, Name, Number, and Note. See “Dialing Speed Dial Numbers” on page 23.

Greeting—From the **Greeting** tab, you can record and review greetings for each Activity state. See “Recording Activity Greetings” on page 15.

MeetMe—From the **MeetMe** tab, you can schedule and monitor phone meetings. See “MeetMe Conference” on page 29.

Line Park—Shows calls parked for line park groups that you are a member of. You can pick up a parked call from the **LinePark** tab. Columns include: Park (the Park ID), Extension, Caller Name, Number, DNIS, and Duration.

To park a call in MaxOutlook, click the **Flash** button on the call control tool bar (you must customize your tool bar to display the **Flash** button), enter #41 (system call park) or #31 (personal call park) in the dialer field, then click the **Connect** button on the call control tool bar.

Changing Activity Status

You can specify your whereabouts, so that others are informed.

Click the Down arrow on the **Activity** buttonand choose the appropriate category:

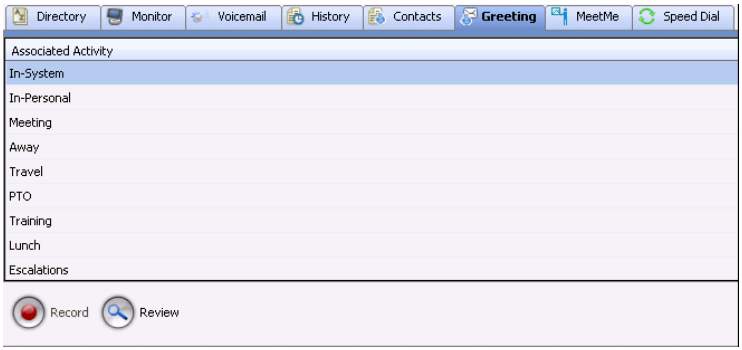
- **Available (System)** (the system greeting is used)
- **Available (Personal)** (your personal greeting is used)
- **Meeting**
- **Away**
- **Travel**
- **PTO** (personal time off)

Your system administrator may have configured additional (Custom) activities to select from.

The activity category you select appears beside the button. Keep your Activity status updated.

Recording Activity Greetings

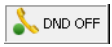
You can record a different greeting for each Activity status. To do so, click the **Greeting** tab, and select an Activity. Then click the **Record** button at the bottom of the tab to record a greeting. (Alternatively, you can right-click the activity, and select **Record**.) Use your phone or headset to record the greeting.



To hear the greeting played back, click the **Review** button. Change your greeting whenever you want to.

Turning Do Not Disturb On and Off

The button is a toggle that turns **Do Not Disturb** on and off.

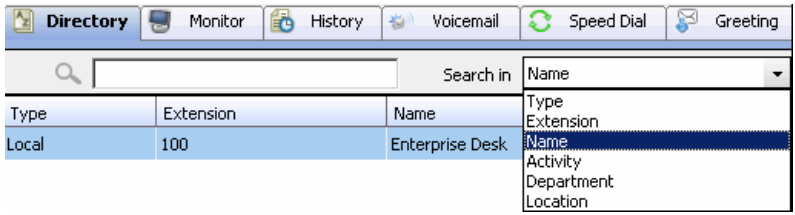


When **Do Not Disturb** is on, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings.

Note: If the system administrator has disabled the Do Not Disturb feature for the extension, the **DND** feature will not be available to you. If you select **DND**, an alert pops up informing you that DND is not allowed.

Searching in the Tabbed Windows

Searching is available in these tabs: Directory, History, Contacts, Voice Mail, and Speed Dial.



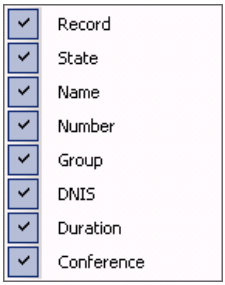
To search,

1. In the **Search in** field, select the column you want to search in.
2. Put your cursor in the field beside the magnifying glass, and type what you're looking for. The search begins as you type, and the list is narrowed to records that match what you're typing.
3. When you begin a new search, all the information that was on the tab reappears. Or you can clear the field beside the magnifying glass or make another selection in the **Search in** field, and you'll see all the information on the tab.

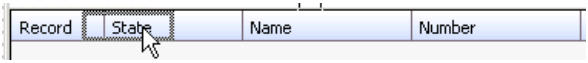
Customizing the Display

You can customize the MaxOutlook display to meet your needs in the following ways:

- **Specify the columns** you want to see by right-clicking a column heading and checking or unchecking columns in the pop-up list. Checked columns will be displayed.



- **Resize columns** by placing the cursor on a column divider in the header area until the cursor changes to a two-headed arrow. Click and drag the column divider to where you want it.
- **Rearrange columns** by clicking and dragging a column name to the location you want.



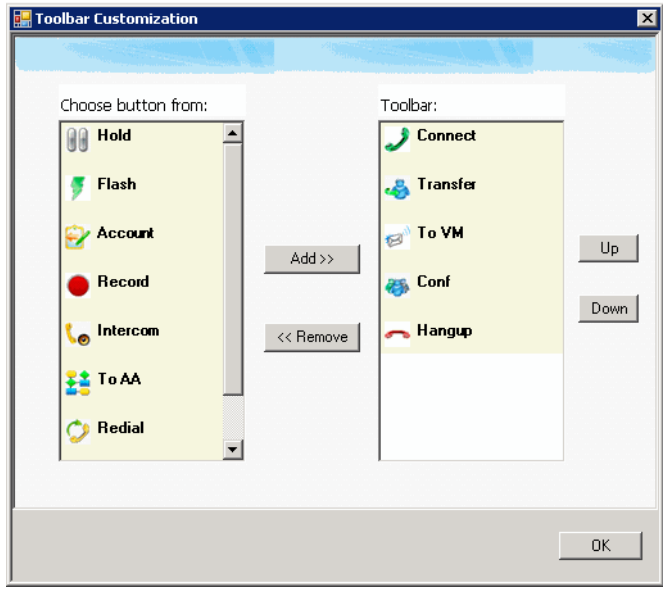
Dragging the Record column to the right

- **Sort columns** in ascending or descending order by clicking the column heading. An ascending (first to last) or descending (last to first) arrow appears. Click the column heading again to sort in the reverse order. If you click a column heading, and all the data in that column is the same, MaxOutlook keeps the sort order of the previously clicked column.

Ascending order

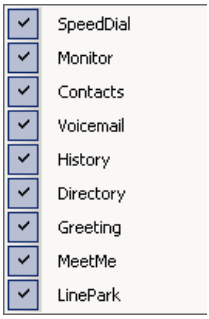
Descending order

- **Add, remove, and rearrange the toolbar buttons** in MaxOutlook by clicking the **Toolbar Customization** button in the call handling toolbar.



The buttons displayed in MaxOutlook are in the right-hand list. To remove a toolbar button, select it and click **Remove**. To add a toolbar button, select a button from the list on the left, and click **Add**. To rearrange buttons, select a button from the list on the right, and click the **Up** button or **Down** button, until the toolbar button is where you want it. When finished, click **OK**.

- **Pop up MaxOutlook** when you get an incoming call while you are doing something else. See “Call Alert Options” on page 59.
- **Specify the tabs** you want to see. To select the tabs you want to display, right-click on the area to the right of the tabs. A list of tabs appears:



They are all checked, by default. Uncheck the tabs you don't want to display.

You can't change the order of the tabs by clicking and dragging, as you can with columns. To change the order of the tabs, uncheck all except the tab you want to appear first. Then recheck each tab you want in the order in which you want it. The tabs will be displayed in the order in which you check them. If you uncheck all the tabs and then want to display tabs again, click the MaxOutlook **Configuration** button in the MaxOutlook status bar and go to **Customization > Tab Layout**.

Performing Other Microsoft Outlook Tasks

To work on other tasks in Microsoft Outlook, click the appropriate Outlook folder or use an available menu command, shortcut, or button in the Microsoft Outlook toolbar, as usual. For example, to check your Outlook Inbox, click the Outlook **Inbox** folder.

The MaxOutlook status bar and call handling toolbar always remain visible.

Returning to MaxOutlook

To return to the MaxOutlook screen, you can do any of the following:

- Click the **MaxOutlook** folder.
- Click a button in the MaxOutlook call handling toolbar.
- Click the **Voicemail** button in the MaxOutlook status bar.

When a call is coming in, MaxOutlook will pop up if you have configured it to do so in the MaxOutlook Configuration screen.

Exiting and Restarting MaxOutlook

To exit MaxOutlook, exit Microsoft Outlook.

Important: Programs take time to exit completely. Before you try to restart Microsoft Outlook, make sure that it goes through its entire shutdown procedure first. If it does not shut down *completely*, and you restart it, Microsoft Outlook will launch without MaxOutlook and without any access to MaxOutlook.

Waiting a few minutes should give Microsoft Outlook enough time to exit completely.

If you're not sure the exiting process is complete, you can open Windows Task Manager to find out. To do so, right-click on the task bar and choose **Task Manager**. Click the Task Manager **Processes** tab, look in its **Image Name** column, and make sure that OUTLOOK.EXE is not listed. (You can sort the column by clicking on the column heading.) If OUTLOOK.EXE is not listed, then it has successfully exited, and it is safe to restart it.

Handling Calls with MaxOutlook

This section shows how to manage your calls, voicemail messages, and contacts.

- Ways to answer calls, see “Answering Calls” on page 21
- Ways to dial out, see “Dialing Out” on page 22
- How to put calls on hold, see“Placing Calls on Hold” on page 24
- How to use call waiting, see “Using Call Waiting” on page 24
- Ways to transfer calls, see “Transferring Calls” on page 25
- How to make conference calls, see “Conference Calls” on page 27
- How to record calls, see “Recording Calls” on page 37
- How to use account codes, see “Using Account Codes” on page 38
- Managing voicemail messages, see “Using Voice Mail” on page 39
- How to monitor extensions, see “Monitoring the Activity of Other Extensions” on page 42
- How to see a history of your calls, see “Viewing the Call History” on page 43
- Managing contacts, see “Using the Contacts Tab” on page 44

Answering Calls

To answer a call click the word *Ringing* in the call’s **State** cell. The state changes to *Connected*.

Record	State	Name	Number	Group
	Ringing	O	5102526353	

Record	State	Name	Number	Gr
	Connected	O	5102526353	

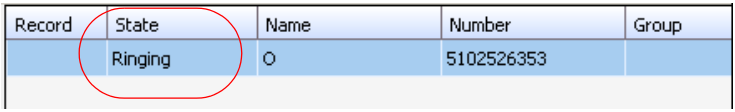
Or, click the **Connect** button in the MaxOutlook toolbar.

Dialing Out

To dial a number, click in the dialing field, enter a number or name, press the Enter key, and then click the **Connect** button in the MaxOutlook toolbar.

Note: To clear the dialing field, delete the number in it, and then press the **Enter** key.

The Call Information panel displays the state of the call:



Shortcut-Key Dialing and Smart Tag Dialing

Shortcut-key dialing—If you configured your MaxOutlook to let you use shortcut keys to dial a selected phone number in another program, for example, Excel or Internet Explorer, you can make a call by selecting the number and using those shortcut keys. To find out more about this option and how to configure it, see the discussion of “Select-n-Dial.”

Smart Tags—If you configured your MaxOutlook to enable Smart Tags, you can call phone numbers from Internet Explorer by clicking a number in IE that has a dotted underline, or from Microsoft Office programs by selecting **Dial By MaxClient** from a Smart Tag beside the number. To find out more about this option and how to configure it, see “Enable Smart Tags”on page 48.

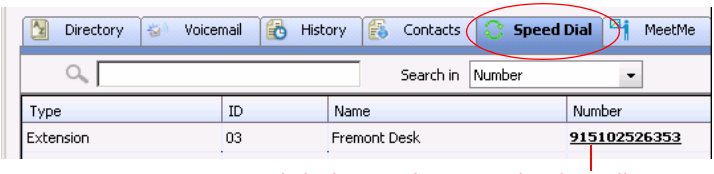
Note: If you have more than one MaxClient installed (MaxCommunicator, MaxAgent, MaxOutlook, or MaxCommunicator/Agent within Microsoft Office Communicator), and you have enabled Smart Tags on more than one, it is best to open only the one you want to do the dialing. If you have more than one open, MAXCS may not use the program you want it to use.

If more than one Smart Tag-enabled program *is* open, MAXCS will use the first one it finds, using this search order: MaxCommunicator, MaxAgent, MaxOutlook.

Additionally, if you were using the Smart Tag method with a particular program, for example, MaxOutlook, and then you open a Smart Tag-enabled MaxAgent, MAXCS will continue dialing a Smart Tag call through MaxOutlook. To have the call dialed through MaxAgent, close MaxOutlook.

Dialing Speed Dial Numbers

To dial speed dial numbers, click the **Speed Dial** tab:



This tab lists speed dial numbers that you have configured at your extension (*extension* speed dial numbers), and it lists speed dial numbers, if any, that have been set up for your extension by the system administrator (*system* speed dial numbers). You can see in the **Type** column which numbers are extension speed dial numbers and which are system speed dial numbers.

To call a speed dial number, click the number in its **Number** column.

Setting Up and Editing Extension Speed Dial Numbers

To set up an extension speed dial number:

1. Click the **Speed Dial** tab and double-click an empty Extention type row. The Extension Speed dialog box pops up.
2. Enter a name, number, and note if desired.
   When you add an outside number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number.
3. Click **OK**.

You can enter up to 20 speed dial numbers.

Note: Extension-type speed dial numbers are also set up by using the **#25** feature code on your phone set.

To edit a speed dial number in MaxOutlook, double-click in its **Type**, **ID**, or **Name** columns. The Extension Speed dialog box pops up. Make your edits, and click **OK**. To delete the information, clear the fields and click **OK**. If you just want to edit a note, you can double-click in the **Note** field on the **Speed Dial** tab and edit the note right in the table.

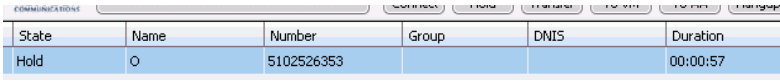
For system-type speed dial numbers, you can edit the note, but only the system administrator can edit the other fields.

Redialing

To redial the last number called, click the **Redial** button on the MaxOutlook toolbar. If the **Redial** button is not on your MaxOutlook toolbar, you can display it by clicking the **Toolbar Customization** button and adding the **Redial** button to your Toolbar list. Click **OK**.

Placing Calls on Hold

During a phone call, either click the word *Connected* in the call's **State** cell or click the **Hold** button in the MaxOutlook toolbar. The state of the call is changed from *connected* to a *hold* state and you will hear the dial tone.



State	Name	Number	Group	DNIS	Duration
Hold	O	5102526353			00:00:57

Click **Hold** in the call's State cell to release the hold and reconnect the call.

Note: When a call is put on hold automatically by the system (to queue), the system will ring you after two minutes if the call is still on hold.

Using Call Waiting

During a call, you may receive another incoming call. To answer the call, click Ringing in the new call's State cell. The call to which you were connected goes to the hold state.

Record	State	Name	Number
	Connected	O	5102526353
	Ringing	Hendy J	8318188219

Click Ringing to answer second call

Record	State	Name	Number
	Hold	O	5102526353
	Connected	Hendy J	8318188219

The first call goes to Hold state

When you are ready to reconnect to the call on hold, click **Hold** in the State cell of the call. The call goes to the connected state.

Transferring Calls

MaxOutlook allows for both supervised transfer (in which you confirm the transfer with the target) and blind (unsupervised) transfers.

You may transfer calls in the following ways:

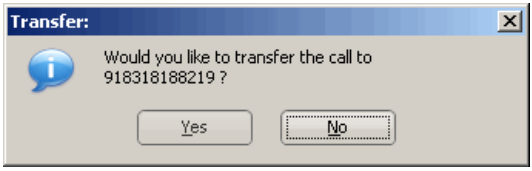
Dragging—Drag and drop the call (either while it's ringing or connected) onto the target number on the Directory, Speed Dial, Contacts, or Monitor tabbed pages.

Dialing—While connected to a call, in the dialing field enter the target number you want to transfer to, then click the **Transfer** button in the MaxOutlook toolbar.

Clicking— If the target number is on the **Directory, Speed Dial**, **Contacts**, or **Monitor** tab, click it. Then click **Transfer**.

You're asked to confirm the transfer.

You can click **Yes** before the party answers to do a blind transfer, or you can wait for the person to answer and then confirm or cancel the transfer.

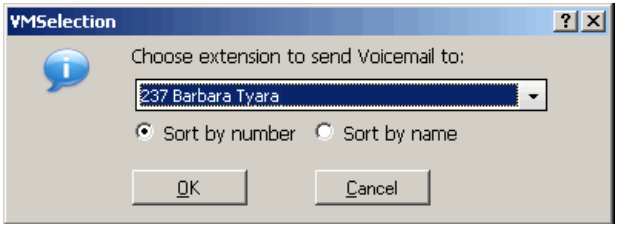


At any time before or after the person you're transferring to answers the phone, you can cancel the transfer by clicking the **No** button or by closing the dialog box.

If the transfer is canceled, MaxOutlook reconnects the call to your extension. The call is also reconnected if the third party doesn't answer.

Transferring to Voice Mail

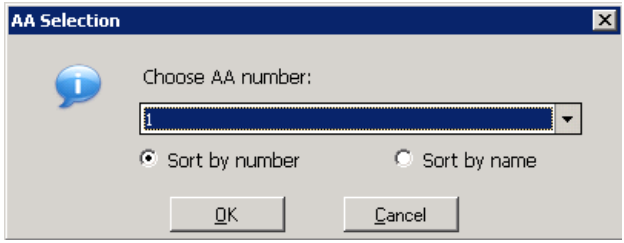
While connected to a call, click the **To Voicemail** button in the MaxOutlook toolbar. In the box that pops up, choose the extension you want to send the call to, then click **OK**. (You can sort extensions by number or by name.)



Note: You can also forward a call to voice mail without answering it by clicking the button while the call is ringing.

Transferring to Auto Attendant

To transfer a call to an auto attendant, while connected to the call click the **To Auto Attendant** button in the MaxOutlook toolbar. The AA Selection box pops up. Use the drop-down list to select an auto attendant to transfer to. (You can sort the list by number or by name.)



Note: You can forward a call to an auto attendant without answering it by clicking thembutton while the call is ringing.

Forwarding Calls Using Do Not Disturb

If allowed, click the **DND** button to forward all incoming calls according to your “Enable Busy Call Handling” settings. See “Busy Call Handling and No Answer Handling” on page 52.

Conference Calls

There are two types of conference calls in MaxOutlook:

- **Station conferencing**. In this type of conferencing, when you're on a call, you can dial a third party and then conference that party in to the call. Any internal user is able to add parties to this type of conference call.
- **MeetMe conference**. If your company has this feature available, you can schedule a meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time. (See "MeetMe Conference" on page 29.)

Station Conferencing

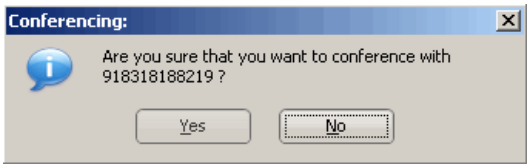
Using this method, you may conference up to six calls.

Note: In order to conference *incoming* calls, **Single Call Waiting**, **Multiple Call Waiting** or **Live Call Handling** must be checked in the MaxOutlook Configuration window, **Extension > Call Handling** screen.

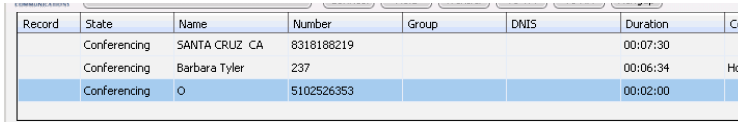
You may conference calls in the following ways:

- **Dragging**—While connected to one party, drag a *Hold* call to the *Connected* call, or drag a number from the **Directory**, **Speed Dial**, **Contacts**, or **Monitor** tabs to the *Connected* call. Repeat to add more callers. Each call in the conference displays *Conferencing* state.
- **Dialing**—While connected to one party, in the dialing field enter the extension or phone number you want to conference with, then click the **Conference** button.

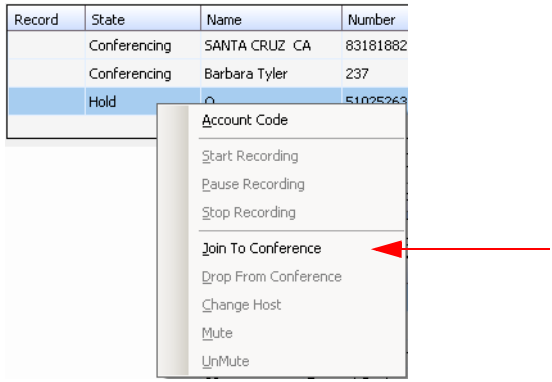
  While MaxOutlook dials the new number, the other party or parties go into *Hold Pending* state, and you see a confirmation dialog box.



  After the dialed party answers, click **Yes**. If the dialed party does not answer, click **No**.



- **Selecting from Menu**—When a call is on hold, you can add it to the conference by right-clicking the call and selecting **Join to Conference**:



Canceling Conference Calls

You can cancel the conference using any of the following methods:

- Click the **No** button in the conference confirmation dialog box.
- Close the conference confirmation dialog box.
- Click the **FLASH** button.
- Right-click the appropriate call and select **Drop From Conference**.

Normally, after canceling you will be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the call's *Hold Pending* state cell.

Note: The conference host is the user who initiates the conference call, and only the conference host can drop a call from conference. If the conference host hangs up, no one else in the conference call can drop a call from the conference.

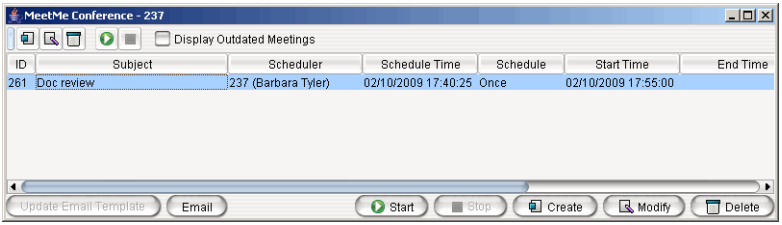
When Conference Participants Are Reduced to Two

The station conference bridge is released when the number of conference participants is reduced to two. The displayed state changes from “Conference” to “Connected” in MaxCommunicator. The call can then be transferred, parked, or tagged with an account code, and another party with privilege can monitor, barge in, listen to, or coach the call.

MeetMe Conference

If your company has this feature available, you can schedule a phone meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time.

To schedule a phone meeting, click the **Schedule Meeting** button.

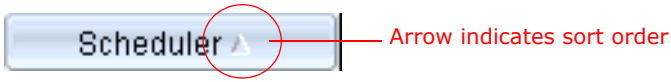


Using this window, you can:

- Create a one-time or recurring meeting and set its parameters
- Send an e-mail invitation (using Microsoft Outlook) to participate in the meeting
- Start and stop a meeting
- Modify or delete a meeting
- See meeting ID, subject, scheduler, time, frequency, start time, end time, the last time the meeting started, its status, and the resource being used.
- Display or hide outdated meetings
- Modify column display

Working in the MeetMe Conference Window

- Click a button to perform a function (for example, create a meeting). The buttons at the bottom of the window are labeled with their function; the buttons at the top of the window perform the same functions. In addition, at the top of the window, you can choose to display outdated meetings by checking the **Display Outdated Meetings** check box. Deselect the check box to hide outdated meetings.
- Select an existing meeting to perform a function on it (for example, to start or stop the meeting). You can select one meeting at a time.
- Functions can also be performed on an existing meeting by right-clicking the meeting and selecting from the context menu.
- Click a column heading to sort by that column. An arrow is displayed that indicates the sort order, ascending or descending. Click again to reverse the sort order.



- Use the scroll bar at the bottom of the window to display additional columns, if necessary.
- Change column size by clicking and dragging a column border.
- Change column order in the current window by dragging a column heading to where you want it.
- You can open more than one MeetMe Conference window and work with different meetings and displays in each one. Modifications you make to the *display* in a MeetMe Conference window are not retained after you close the window.
- You can double-click a meeting to open the Modify Meeting dialog box.

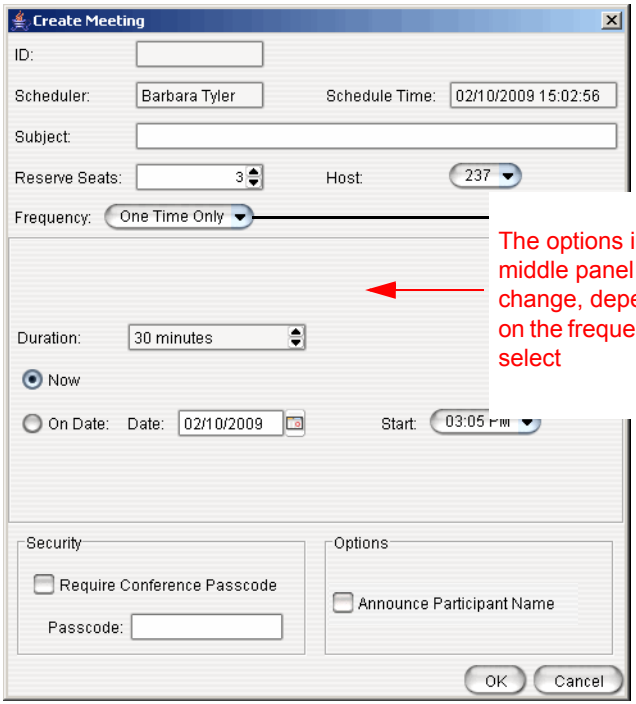
Using the Calendar Button

The Create Meeting and Modify Meeting dialog boxes use Calendar buttons for date selection. To select a date, click the **Calendar** button. When the calendar is open, use the Up/Down arrows to select the year, *or* you can type in a year and then press **Enter**.

Click the **Calendar** button again to close the calendar.

Creating a Meeting

To create a meeting, click one of the **Create** buttons.



The options in the middle panel change, depending on the frequency you select

The following parameters apply to all meetings:

Parameter	Description
ID	The conference ID is created by the system.
Scheduler	The name of the person scheduling the meeting.
Schedule Time	The time the Create Meeting dialog box was opened to create this meeting.
Subject	Identifies the subject or type of meeting. What you enter here should be easily identifiable in the meeting list.

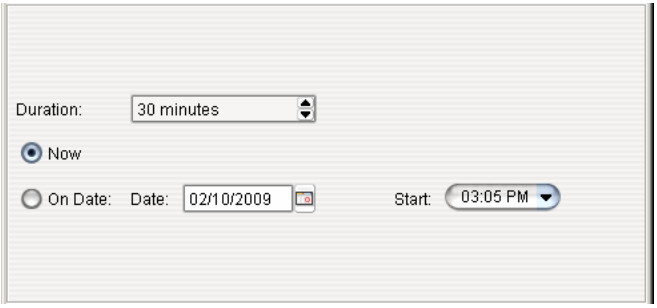
Parameter	Description
Reserved Seats	Use the Up/Down arrows or type in a number, up to 30, to indicate the number of expected participants. If your company's phone system allows it, you can invite up to 120 participants. If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.
Host	Select the extension number of the host of this meeting. The host can start and stop the meeting and can mute and drop meeting members.
Frequency	Select the frequency of this meeting from the drop-down list. A "weekly" or "monthly" meeting can actually be specified as every 2nd week/ month or every 3rd week/month, and so on.
Middle panel: Options in the middle panel vary according to the frequency of the meeting. See the sections below this table.	
Require Conference Passcode	If you check this, no one can participate who does not enter the conference passcode that you supply.
Passcode	If you are requiring a passcode, enter it here.
Announce Participant Name	If you want participant names announced when they enter the meeting, check this check box.

Fill in the fields of the Create Meeting dialog box, and click **OK**. See the following sections for directions on filling in the fields in the middle panel of this dialog box.

Note: If other scheduled meetings have already reserved resources for the time period, and sufficient resources are not available for the meeting you are attempting to schedule, a message pops up telling you that there is a resource conflict.

One Time Only Meeting

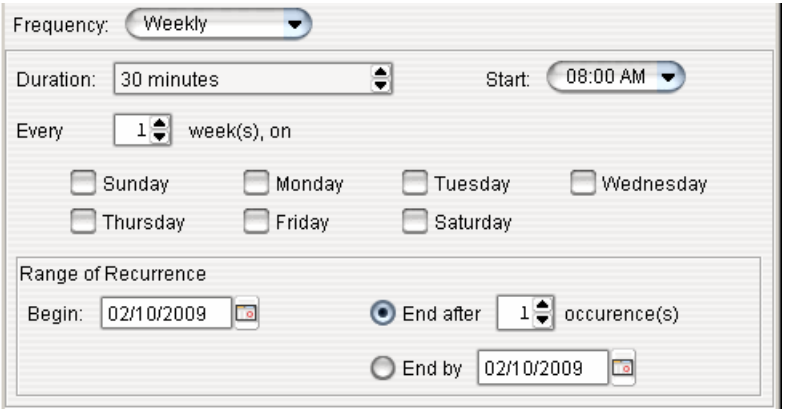
If you select **One Time Only** from the **Frequency** drop-down list, these are your options in the middle panel:



1. Specify the duration of the meeting, using the Up/Down arrows.
2. If the meeting is to begin as soon as it is scheduled, select **Now**.
3. If the meeting is to begin at another time, select **On Date**, and enter a date and start time. To select a date, click the **Calendar** button. To select a start time, click the Down arrow and use the slide bar.

Weekly Meeting

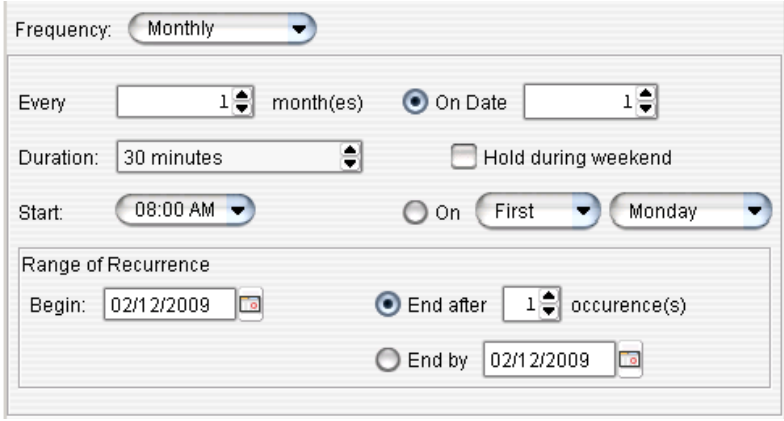
If you select **Weekly** from the **Frequency** drop-down list, these are your options in the middle panel:



1. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
2. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
3. In the **Every** field, specify how often this meeting is to occur: every week, every other week, every three weeks, and so on.
4. Check the day of the week on which this meeting will occur.
5. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
6. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date at which the meetings will cease.

Monthly Meeting

If you select **Monthly** from the **Frequency** drop-down list, these are your options in the middle panel:

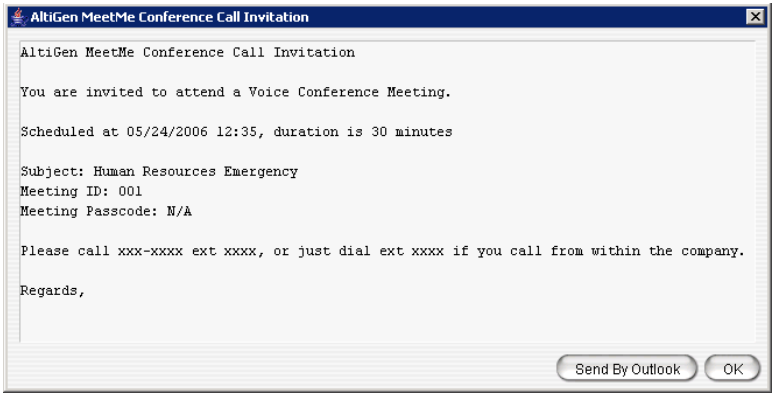


1. In the **Every** field, specify how often this meeting is to occur: every month, every other month, every three months, and so on.
2. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
3. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
4. Select either **On Date** to specify a day of the month by *number* (for example, the 10th day of the month) or select **On** to specify a day of the month by *name* (for example, the first Monday of the month).

5. If you use **On Date**, the specified date (for example, the 10th day of the month) may sometimes fall on a weekend day. Check the box **Hold during weekend**, if the meeting will be held even on a weekend day.
6. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
7. Select **End after x occurences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date by which the meetings will cease.

E-mailing a Meeting Invitation

In the MeetMe Conference window, click the **Email** button to see an automatically generated meeting invitation. It will look something like this:


AltiGen MeetMe Conference Call Invitation
AltiGen MeetMe Conference Call Invitation
You are invited to attend a Voice Conference Meeting.
Scheduled at 05/24/2006 12:35, duration is 30 minutes
Subject: Human Resources Emergency
Meeting ID: 001
Meeting Passcode: N/A
Please call xxx-xxxx ext xxxx, or just dial ext xxxx if you call from within the company.
Regards,
Send By Outlook
OK

In the Invitation window, you can then click the **Send by Outlook** button. The meeting invitation is pasted into a new message in Microsoft Outlook, and the Microsoft Outlook **Subject** field is filled in with “Conference Call Invitation”. Choose the people to whom you want to send the invitation, make any edits you may want to make, and click **Send**.

Starting and Stopping a Meeting

The meeting host and the MaxAdministrator (“admin”) can start and stop a meeting.

To start a meeting if you are the host, select the meeting in the MeetMe Conference window and choose **Start**. Once the meeting is “started,” the host can log into it (see “Joining a MeetMe Conference” on page 37).

To stop a meeting before its scheduled duration is over, select the meeting and choose **Stop**. Manually stopping a meeting frees up resources. Otherwise, the resources will not be freed until the scheduled meeting duration is over.

What the MeetMe Conference Host Can Do

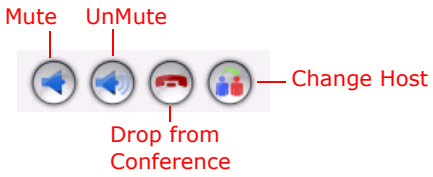
If you are the host of a MeetMe conference, in addition to starting and stopping a meeting, you can:

- Mute/unmute other participants

Note: If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.

- Drop participants from the conference
- Make someone else the host

To do any of these, either right-click the person's name in the MeetMe window and choose a command from the context menu, or use the buttons at the bottom of the MeetMe tab:



Note: Changing the host does not affect the **Mute** setting for the original host or the new host. If the new host was muted before the transfer of hosting duties, that host will have to **UnMute** himself in order to be heard. Similarly, the original host will still be unmuted if he was unmuted before transferring hosting duties.

Continuing a Meeting Beyond Its Duration Time

When the scheduled meeting time is up, the meeting may continue if no other scheduled meeting needs the resources. If another meeting is scheduled and the resources are needed for that meeting, the current meeting is terminated.

Joining a MeetMe Conference

Users calling from an extension can join a meeting by dialing the MeetMe Conference extension number. Users calling through a trunk must first dial the company number, then the MeetMe extension number.

Users are prompted to dial the meeting ID number. If the meeting has not yet been started, the user hears an appropriate message and can try again later.

If a passcode is required, the user is prompted to enter the passcode.

Recording Calls

The voice recording feature in MaxOutlook allows a user to record conversations. Recorded conversations can then be played back through voice mail or accessed at a centralized location.

Note: The voice recording feature is only available to Triton Analog extensions and IP extensions.

WARNING: Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.

Recording on Demand

When the system administrator has set your extension to record on demand (either to a central location or to your voice mail), you can use MaxOutlook to initiate the recording.

To record a call—While connected to a call, click the **Record** button or right-click the call and select **Start Recording** from the context menu. While a call is being recorded, a round red icon appears in the call's **Record** column. If your system administrator has set the **Insert Recording Tone** option for your extension, both parties will hear a tone when the recording begins and every 15 seconds thereafter.

To pause recording—Right-click the call and select **Pause Recording**.

To end recording—Right-click the call and select **Stop Recording**.

To listen to the recording—If the system is set to save the recording as your voice mail, you can hear the recording through the AltiGen Voice Mail System. If the recording is being saved to a centralized location, contact the system administrator for the location.

Note: Do not enter an account code while recording, because doing so will disconnect the call.

Using Account Codes

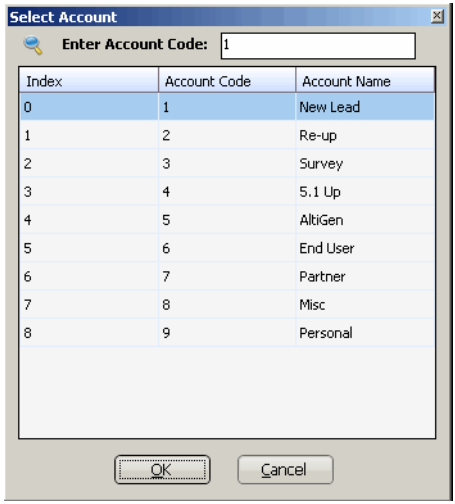
If your system is set up to use account codes, you can associate calls with specific codes for billing or tracking purposes.

Required account codes—If your extension has been configured to require account codes for all outbound calls, the Account Code dialog box pops up prompting you to enter an account code for each outbound call. The dialog box may or may not contain a list of account codes, depending on how the administrator has configured your extension. After entering the code, click **OK**.

If your extension configuration allows you to override the account code requirement, you can either enter an account code in the field at the bottom of the dialog box or click **OK** to bypass the account code altogether.

Optional account codes—You may enter an account code without being prompted.

To associate a call in progress with an account code—Click the **Account Code** button in the MaxOutlook toolbar, or right-click the number, and choose **Account Code** from the menu.



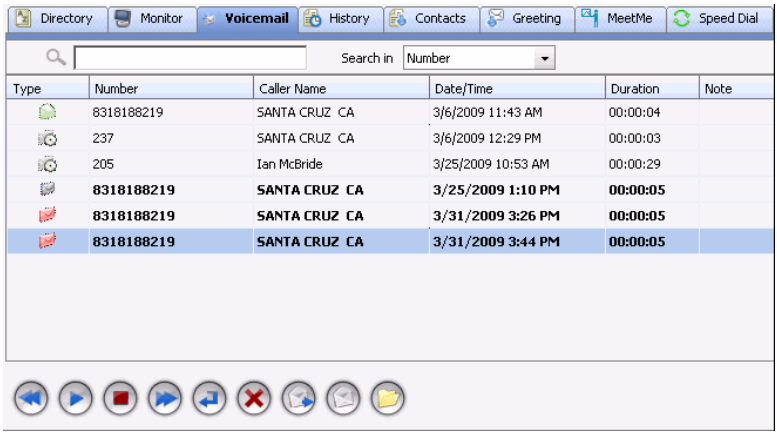
In the Account Code dialog box, select an account code if a list is displayed, and click **OK**. If a list is not displayed, enter an account code in the **Enter Account Code** field and click **OK**.

Note: Do not enter an account code while recording; doing so will disconnect the call.

To change the account code for a call in progress, repeat the steps above, entering the new account code to assign the call to.

Using Voice Mail

Click the Voicemail tab in the MaxOutlook window to see a list of your voice mail messages. Clicking the **Voicemail** button in the MaxOutlook status bar also displays the Voicemail tab.



- New voice mail messages are indicated by a white, closed envelope and bold type.
- Heard voice mail messages are indicated by a green, open envelope.
- Messages marked urgent are indicated by a red, closed envelope. When you have a message marked urgent, the MaxOutlook icon in the Windows tray bears a red envelope.
- A paperclip symbol on the envelope indicates an attachment—a voice mail message forwarded from another extension.

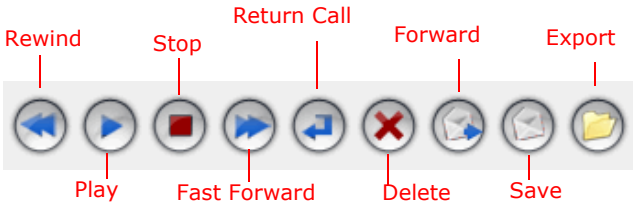
Dealing with Voice Mail

Select the message and use the voice mail command buttons at the bottom of the **Voicemail** tab, as shown in the figure below. You can also access these commands by right-clicking a voice mail and selecting a command from the context menu.

Listening options are configurable, as described in “General Information” on page 47. You can listen using the sound card on your PC or your phone. If you’re not using IPTalk, you can play voice mail to a sound card while your phone is in the connect state. (You cannot do this if you’re using IPTalk.)

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard, and the type font changes from bold to regular. Also, when you play a voicemail, MaxOutlook shows *Play* in the Call Control panel, and shows the play duration . (The duration does not reflect fast forwarding or rewinding.)

Use the voice mail command buttons to perform the following functions:



Save at Remote Server or Export Locally

You can save a message as a .wav file that you can play back later. To do so, select the message and click either the **Save** button or the **Export** button (or right-click the message and choose **Save** or **Export**).

- **Save** saves the message automatically on a remote server in a location designated by the system administrator. No file saving dialog box opens.
- **Export** opens a file saving dialog box that lets you name the .wav file and choose a directory in which to store it. You can then play the .wav file on a media player.

Deleting Messages

To delete a selected message, click the **Delete** button, or right-click a message and select **Delete** from the context menu.

Returning a Call

To return the call, select the voice mail and click the **Return Call** button or click the number in the **Number** field.

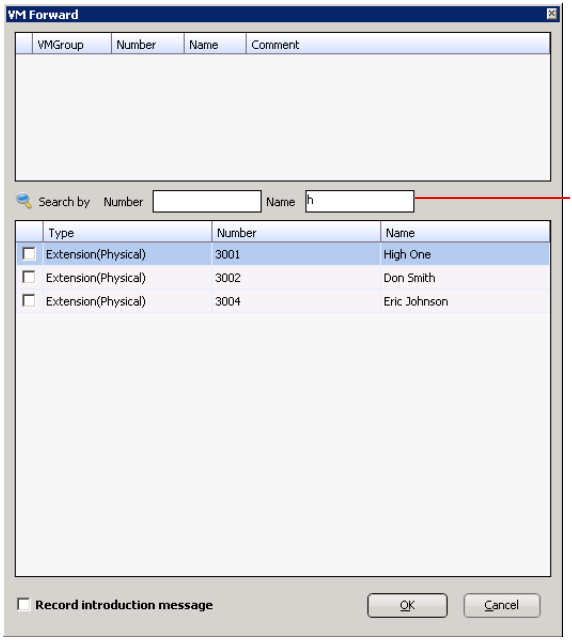
Attaching a Note

To add a note to accompany a voice mail, double-click in the **Note** field and type your note. Or right-click a voice mail entry and choose **Note** from the pop-up menu. Type your note and click **OK**.

Forwarding Voice Mail

To forward a voice mail to an extension or a VM Group

1. Select the voice mail and click the **Forward** button, or right-click the voice mail and select **Forward**.



2. Check the check box next to the extension to which you want to forward the message.

   If you need to search for a person by extension or name, type the first letters of the number/name into the **Search by Number** or **Name** box. The matching extensions or names display in the list as you type.

   Notes:

   - Click the column headings to sort the data.

- If the extension name is configured for an extension, it is used to match the search string. If the extension name is not configured, then the extension number is used to match the search string for this extension.

3. Click **OK** to complete the forwarding.

Monitoring the Activity of Other Extensions

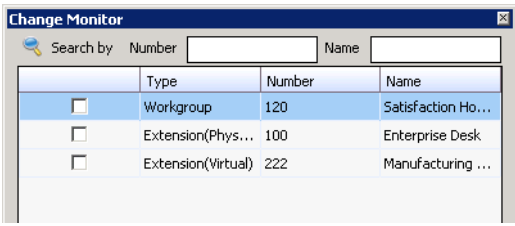
If your system administrator has configured your extension for monitoring specific other extensions, you can monitor the activity on those other extensions or view call history.

If you're a manager, for example, you might monitor to determine whether you need more resources in a busy environment. Or you might use monitoring capability to cover calls for a co-worker, since you can click the ringing phone icon in the monitor list and take the co-worker's call.

Choosing Extensions to Monitor

To choose extensions to monitor:

1. Click the **Monitor** tab, and click the **Select Extensions** button at the bottom of the Monitor page. Extensions to which your administrator has given you monitoring rights are listed here.



2. Select the check boxes next to the extensions you want to monitor, and click **OK**. If the list is long and you want to search, type a number or name in the appropriate search box.

   The extensions you select will be listed on the **Monitor** tab.

Reading the Monitor List

The monitor tab includes these fields: **State, Extension**, **Name**, **Activity**, **DND/FWD**, **Caller Name**, **Number**, **Department**, **Location**, **DNIS**, and **Duration**.

The state can be one of the following:

- **Idle**—the extension is not in use

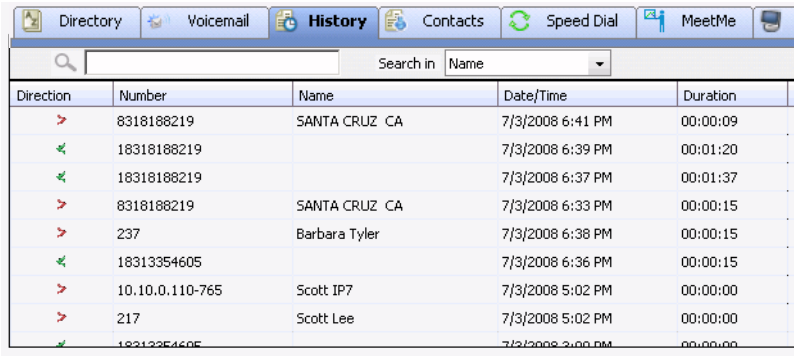
- **Connected**—the extension is in use
- **Ringing**—the phone on the extension is ringing; you can click the **State** field to pick up the call at your own extension
- **Conferencing**—the extension is on a conference call
- **Voicemail**—the extension is in voice mail
- **Auto Attendant**—the extension is connected to an auto attendant
- **Holding**—the extension is on hold
- **Hold Pending**—the extension is on hold, and an action is pending
- Virtual Extension

Calling a Monitored Extension

If a monitored extension is *Idle* (green dot) you can click its **Extension** field to ring the extension.

Viewing the Call History

Click the **History** tab to view data about handled calls.



Note: Click on the column headings to sort the data.

The **History** tab displays the following fields:

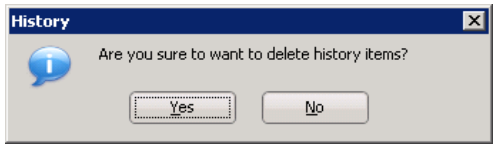
- **Direction**—indicates if the call is incoming or outgoing, or was a missed call. *Left-pointing green arrow* indicates outgoing call; *right-pointing red arrow* indicates incoming call. Right-pointing arrow with exclamation point indicates a missed call.
- **Number**—the extension or phone number on the other end of the call. Click a number in the **Number** column to dial that number.

- **Name**—Caller ID information, if available.
- **Date/Time**—the date and time of the call.

  When you sort on Date/Time, the calls are sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

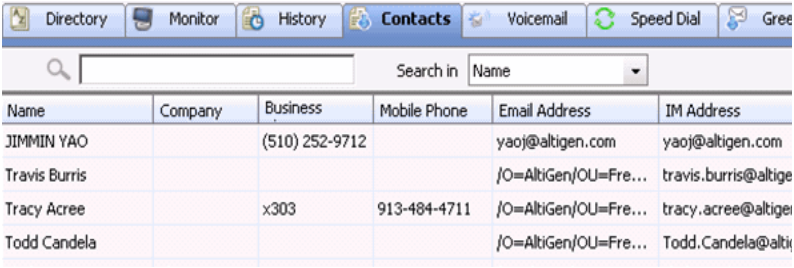
  Also, the timestamp for call data is based on the client system, while the timestamp for voice mail messages is from MAX Communication Server. Thus, the times displayed here may not match those in the voice mail view in the main window.
- **Duration**—the duration of the call.
- **DNIS**—DNIS digits collected, if available
- **Group**—Group number or name
- **Note**—a note attached to the call. To enter a note, double-click the **Note** field and type your note.

Use the **Delete** button to delete selected calls in the history list. Use the **Delete All** button to delete the entire call history list. MaxOutlook will ask you to confirm the deletion; click **Yes** to delete or **No** to cancel:



Using the Contacts Tab

To populate the **Contacts** tab with the contacts listed in your Microsoft Outlook, see “CRM Integration” on page 60. Once the list is populated, the numbers that appear on this tab can be called, transferred to, and conferenced just like any other number.



E-mail a contact—Click a contact's e-mail address to send an e-mail to the contact.

View the contact's information—Right-click on a contact to pop up the Microsoft Outlook contact window for this contact.

CHAPTER 5

Configuring MaxOutlook

Using the MaxOutlook Configuration window, you can configure the following behaviors and options:

- **General Info**—password, default trunk access, and other general settings.
- **Call Handling**—forwarding, busy call, and no-answer call handling; call waiting; number of rings before forwarding; automatic answering.
- **One Number Access (ONA)**—forwarding of specific incoming calls.
- **Message Notification**—how and when you want to be notified about incoming voice messages.
- **Call Alerts**—screen pops and audio beeps.
- **Playing voicemail**—through handset or soundcard.
- **Integration**—integrating with a Microsoft Outlook CRM.
- **Display Customization**—tab layout. (Theme selection is default only.)
- **IPTalk**—IPTalk settings.
- **Log**—enabling a log to be created for IPTalk and for this application (MaxOutlook) to trace errors.

Note: Some options may not be available to you.

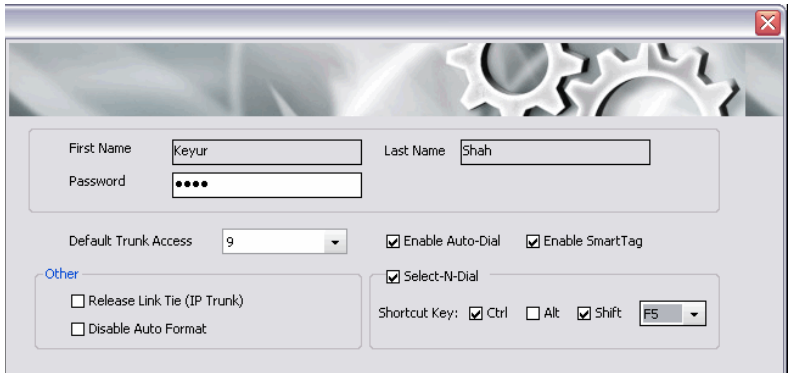
Click the Configuration button in the MaxOutlook status bar to configure these options.

In the Configuration window, click **Apply** or **OK** to save your changes:

- **Apply** saves your changes and lets you continue in the Configuration window.
- **OK** saves your changes and closes the Configuration window.

General Information

The **General Info** screen lets you edit your password and the default trunk access code, release the link tie for IP trunks, and disable auto format.



You can configure these general settings:

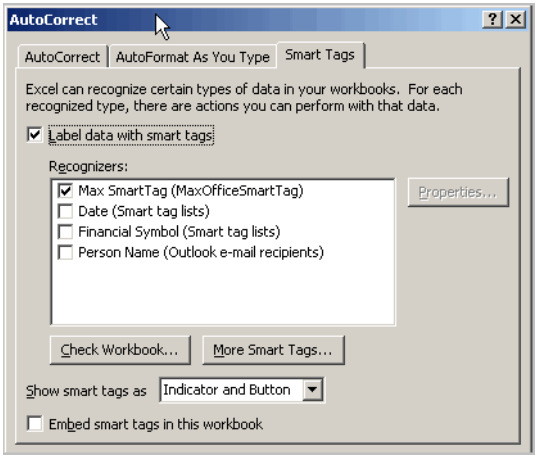
- **Default Trunk Access**—The trunk access codes are defined by the system administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.
- **Enable Smart Tag**—If you check this option, two things happen:
  - In Internet Explorer, a dotted underline will appear under telephone numbers. You can click the number to make the call.
  - In Microsoft Office programs (Office 2003 and 2007), a Smart Tag action icon will appear by the phone number. From the Smart Tag's drop-down menu, you can select **Dial By MaxClient**.

    Whether the call is made automatically or the number is simply placed in the dialer box depends on how you set Auto-Dial (see below).

    The Microsoft programs in which you want to use this option must be open when you set the option. After checking **Enable Smart Tag**, you need to close and reopen Internet Explorer and the Microsoft Office programs. Then you must configure your Microsoft Office programs to display the Max Smart Tag, as follows.

Configuring Microsoft Office programs to display the Max Smart Tag

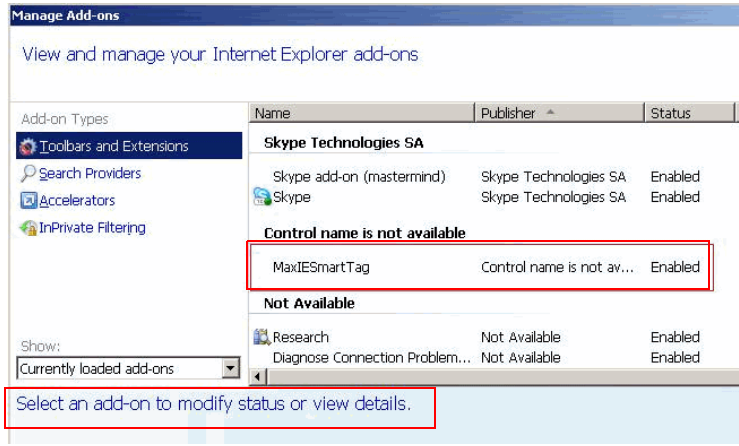
1. In each Microsoft Office program in which you want to use this feature, select **Tools > AutoCorrect Options**, and click the **Smart Tags** tab. The following figure shows the AutoCorrect dialog box in Excel.


AutoCorrect
AutoCorrect
AutoFormat As You Type
Smart Tags
Excel can recognize certain types of data in your workbooks. For each recognized type, there are actions you can perform with that data.
Label data with smart tags
Recognizers:
Max SmartTag (MaxOfficeSmartTag)
Date (Smart tag lists)
Financial Symbol (Smart tag lists)
Person Name (Outlook e-mail recipients)
Properties...
Check Workbook...
More Smart Tags...
Show smart tags as
Indicator and Button
Embed smart tags in this workbook

2. Check **Label Data with Smart Tags**, and check **Max Smart Tag**.
3. Click **OK**.

Enabling / Disabling the Max Smart Tag in Internet Explorer

You can enable and disable the Max Smart Tag in Internet Explorer. In IE, go to **Tools > Manage Add-ons**. The Manage Add-ons dialog box opens:



To enable or disable the MaxIESmartTag, select it and click the **Enable** or **Disable** button at the bottom of this dialog box (not shown in figure).

- **Select-n-Dial**—Select-n-Dial lets you select a phone number from any window, for example, Internet Explorer, Microsoft Word, Excel, Notepad, and so on, and then press the keys you define here to dial that number. To set up this option,

  1. Check the **Select-n-Dial** check box.
  2. Select a combination of keys as your shortcut: Select one key from the drop-down list. (You can select from 0-9, A-Z, and F1-F12.) In addition, check either **Ctrl**, **Alt**, or **Shift** or a combination of these keys. For example, your shortcut might be Ctrl+F2 or Alt+Shift+k. Make sure the shortcut you define is not the same as a shortcut being used in any other program you're likely to have running.
  3. Click **Apply**.

  You can use this option in conjunction with Auto-Dial, described next.

- **Enable Auto Dial**—If you check this box, any phone number you dial using a Smart Tag or the Select-n-Dial method is dialed automatically. The phone number appears in the **Number** column and the state column displays *Ringing*.

If this box is *not* checked, then a phone number selected by the Smart Tag method or the Select-n-Dial method is displayed in the MaxAgent dialer, and you need to click the **Connect** button to make the call.

- **Release Link Tie (IP Trunk)**—When checked, clicking the **Transfer** button will automatically send "FLASH *" to release a tie trunk if the incoming call is through an IP trunk. (Option is disabled by default.)

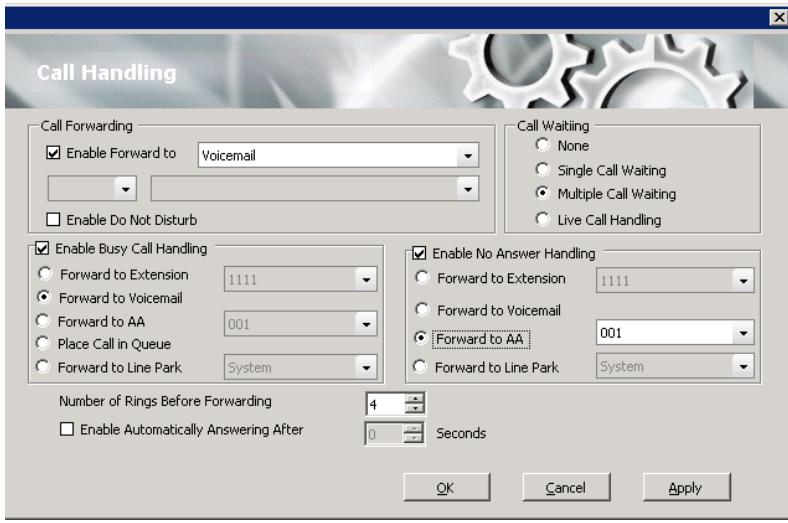
  IMPORTANT! Before checking this check box, see your phone system administrator. If your company is using multiple systems and the tie trunk feature, the administrator **needs to have used Enterprise Manager to synchronize the systems**. Otherwise this feature *will not work*.

  Note: The call being transferred must originate from an AltiGen PBX system running AltiWare ACC/ACM 5.0 or later, or MAXCS ACC/ACM 6.0 or later.

- **Disable Auto Format**—If the MAX Communication Server's country code is US/Canada, MaxOutlook automatically adds the long distance/ international dialing prefix (corresponding to the server's country code) when returning a call from voice mail or when making a call from the **History** tab. If this is not appropriate for your setup, check **Disable Auto Format**.

Call Handling

Click the **Call Handling** tab in the Config window to configure incoming call handling for your extension.



Forwarding All Calls

To forward all calls, check **Enable Forward to** and choose a forwarding destination. If you want to forward calls to an external number, select a trunk access code in the drop-down list, then begin with the outside trunk or route access digit (usually **9**)and any long distance prefix digits such as **1** and area code.

Note: Forwarding calls to a pager is possible but *not recommended* since callers will only hear what is heard when calling a pager and might not know to enter a return phone number unless instructed.

Do Not Disturb

If you check **Enable Do Not Disturb**, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings, described below.

Checking **Enable Do Not Disturb** here has the same effect as clicking the **DND** button in the MaxOutlook main window.

Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've checked **Enable Do Not Disturb**.

If you want to use the auto attendant and you don't know the number of the phrase or menu you want to use, check with your system administrator.

Place call in queue is available only if your system administrator has enabled queuing for you.

Number of Rings Before Forwarding

The **Number of Rings Before Forwarding** setting pertains to almost all the options in this screen. It is the number of times the phone rings before the system forwards the call to an extension, voice mail, or the auto attendant.

To have MaxOutlook automatically pick up the call, check the **Enable Automatic Answering after x Seconds** check box and use the arrow keys to choose the number of seconds.

Note: The default setting is 0 seconds. If the duration is set to 0, all incoming calls will go to connect state right away. Neither caller nor callee will hear a ring tone.

Note: This feature requires one of the following: 1) an IP or analog extension to which the system administrator has assigned feature code #82 (dial tone disabled mode); or 2) MaxOutlook is running with IPTalk softphone enabled.

Call Waiting Options

Call waiting options are available only if the **Enable Busy Call Handling** check box has been checked, but this option is available *only for non-workgroup calls*.

- **Single Call Waiting**—sets up single call waiting. This feature gives an alert tone (audio beep) to indicate that a call is waiting. **Single Call Waiting** must be selected in order to conference incoming calls.
- **Multiple Call Waiting**—enables a “non-workgroup queue” of multiple calls waiting. You must also select the **Place Call In Queue** option under **Enable Busy Call Handling** to enable this option. This allows you to transfer or park the current call before picking up the next call in queue.
- **Live Call Handling**—when enabled, allows a caller to hear a ringback tone when the called party is in voice mail, paging, transfer, or conference state.

One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must specify the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

When you answer an ONA call, you may be required to enter your extension password, depending on the configuration for your extension set by your system administrator.

Before You Set Up ONA

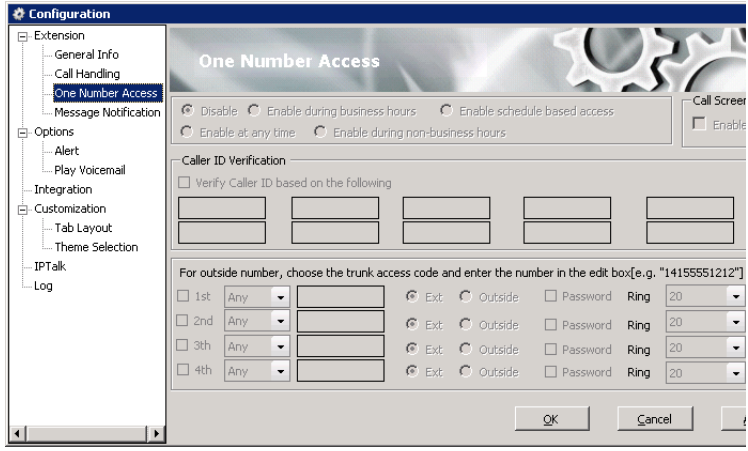
- ONA must be enabled for your extension by your system administrator.
- The settings on your MaxOutlook **Call Handling** tab must not conflict with ONA. Specifically:
  - **Enable Do Not Disturb** must not be checked. If it is, when your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.
  - **Enable Forward to** must not be checked. If it is, all calls will be forwarded according to this setting.

  See "Call Handling" on page 51 for details on these settings.

Setting Up One Number Access

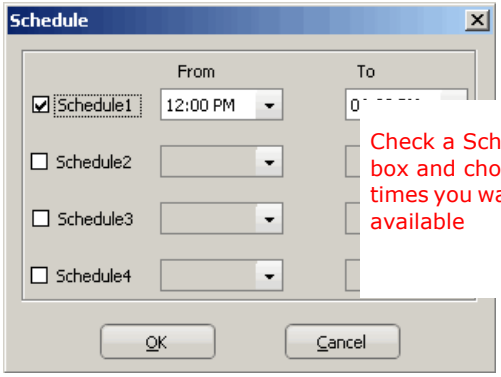
To set up one number access,

1. Click **Extension > One Number Access** in the Configuration window.



2. Select the times you want to be available to ONA callers.

   If you choose **Enable schedule based access,** you can set up to four different schedules in the dialog box that pops up:



3. Check the **Enable Call Screening** check box if you want the system to prompt the ONA caller to record a caller name to continue ONA.
4. If you want, check the **Verify Caller ID based on the following** check box and then specify the incoming phone numbers for ONA. If ONA finds one of these numbers on an incoming call, it will forward the call to you.

   You can enter up to 10 phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits—area code + local number.

   Note: If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

Using a Password

You can use a Caller ID Verification field to enter a password number such as “5555” so that a caller who knows this password can use ONA to find you, regardless of where they are calling from. Tell the caller to dial **1** during your personal greeting and then enter the password.

5. Enter the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers—extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use. Specify whether the number is an extension or outside number and if a password is required.

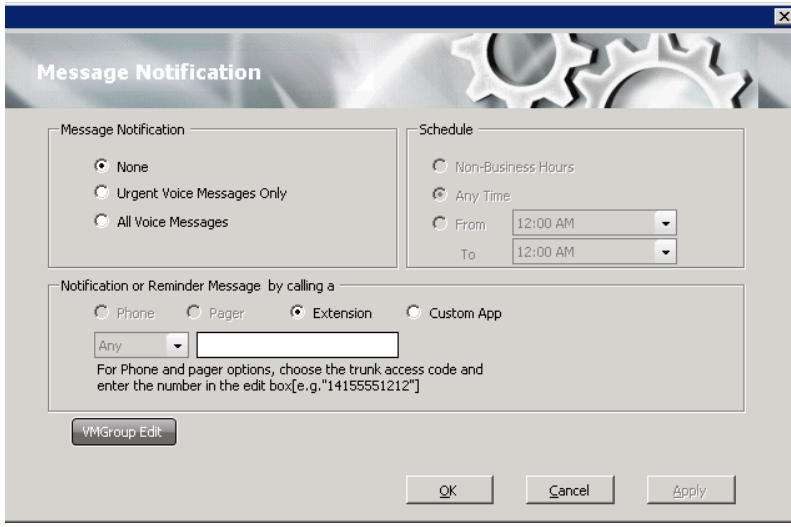
   When ONA is active, the system dials the forwarding number(s) in the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order—for example, Forwarding Number 2 is *not* used first during Schedule Number 2.

Note: If your system administrator has *not* configured your extension to require you to enter your extension password when answering an ONA call, then a call forwarded via ONA that is picked up by a voice mail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a last resort, it should be Forwarding Number 4.

You can set the **ONA ring duration** from 5 to 45 seconds using the **Ring** drop-down lists. Default value is 20 seconds. The system will ring the ONA target during the specified time limit. If the ring time exceeds 30 seconds, the system will play a phrase every 15 seconds (playing time is included in ring time).

Message Notification

You can specify how and when you'd like to be alerted to new messages when you're away from your desk. Click **Extension > Message Notification** in the Configuration window to display the Message Notification configuration screen.



You can set these notification options:

- **The types of messages** about which you want to be alerted: none, urgent voice messages only, or all voice messages.
- **Schedule**—Select during what hours you want to be alerted.

- **How and where to notify you**—Select an option in the **Notification or Reminder Message by calling** section. If you want to use an outside number, use the drop-down list to select the trunk access code, and then type in the number.
- **Voice Mail Groups**—You can set up and edit voice mail groups.

Note: You can also configure Message Notification through the AltiGen Voice Mail System.

Working with Voice Mail Groups (Distribution Lists)

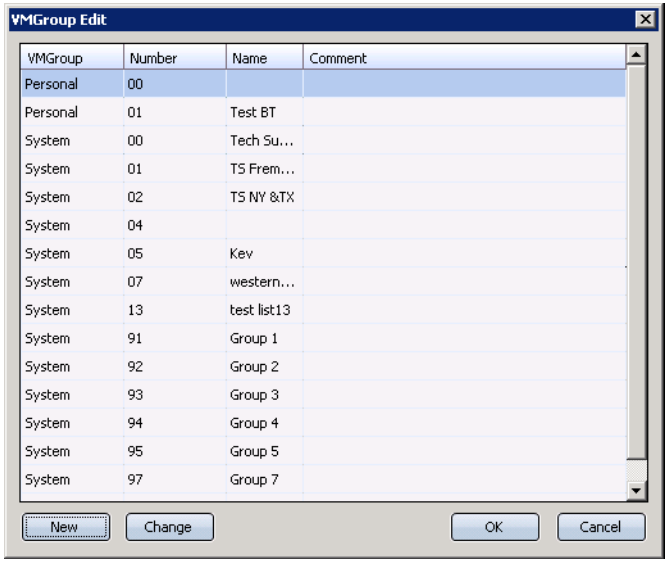
You can set up voice mail groups (distribution lists) to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail (VM) groups, each with 64 members. Group members can be any extension or another voice mail group.

There are two types of voice mail groups you can use:

- **System-based groups** are set up by the system administrator. You can use but not edit these lists in MaxOutlook. You can, however, add a comment that is displayed in your MaxOutlook.
- **Personal groups** can be set up and modified in MaxOutlook or in your AltiGen Voice Mail System.

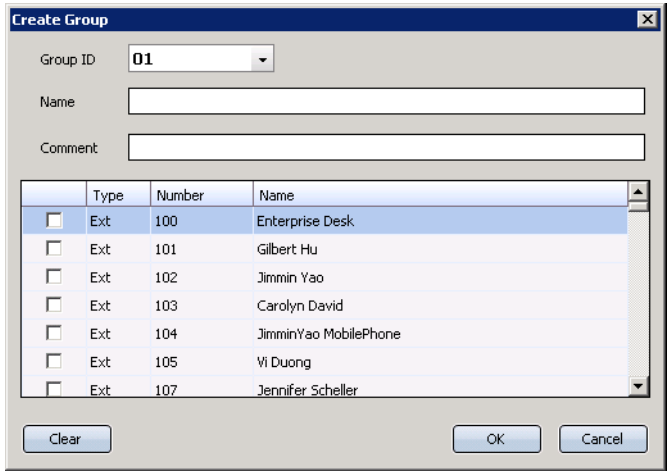
Working on Voice Mail Group Lists

To work on your personal voice mail groups, on the Message Notification page, click the **VMGroup Edit** button.



Creating a personal voice mail group

1. **C**lick the **New** button in the**VM Group Edit** dialog box. The **Create Group** dialog box opens.



2. Click the drop-down list to select a **Group ID**.

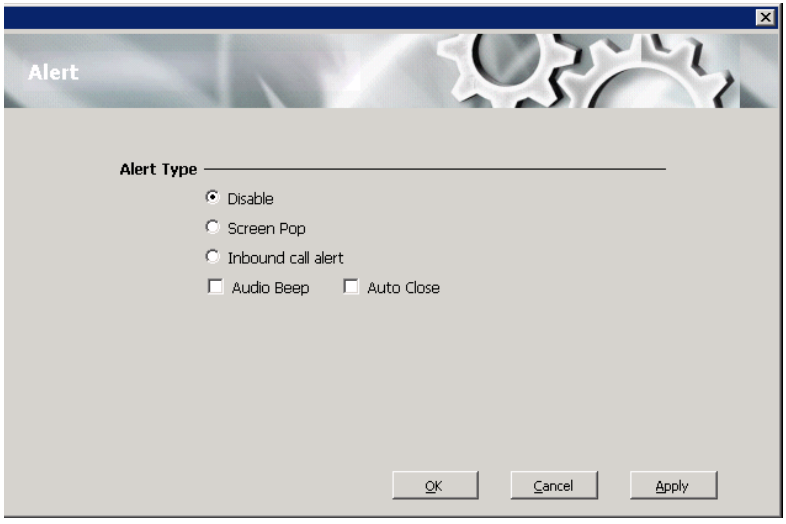
3. Enter the VM Group **Name** and any **Comments**. These are optional but will help you identify the group.
4. Select the member extensions by selecting the check box next to each extension.
5. When finished, click **OK**. Click the **Clear** button to deselect all extensions or click **Cancel** to exit without saving your edits.

Changing a personal voice mail group

1. Click the **VM Group Edit** button. The VM Group Edit dialog box opens.
2. Select the group you want to change, and click the **Change** button.
3. Make any changes you need to make for the group name, comments, or members. To add or remove a member, select or deselect the check box next to the extension.
4. Click **OK**.

Call Alert Options

If you want MaxOutlook to inform you when you have a call, specify your desired method(s) in the Configuration window's **Options > Alert** screen.



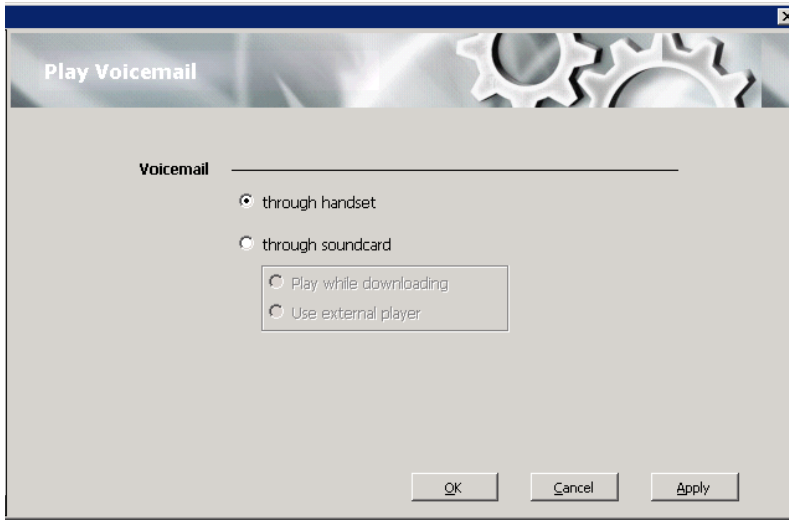
You can set these alert options:

- **Disable**—Disables screen pop.

- **Screen Pop**—When a new call comes in, the MaxOutlook main window pops up. You can then answer the call or perform other MaxOutlook actions.
- **Audio Beep**—Your computer beeps you when you have a call.

Voice Mail Play Options

Choose **Options > Play Voicemail** in the Configuration screen to set voice mail play options.

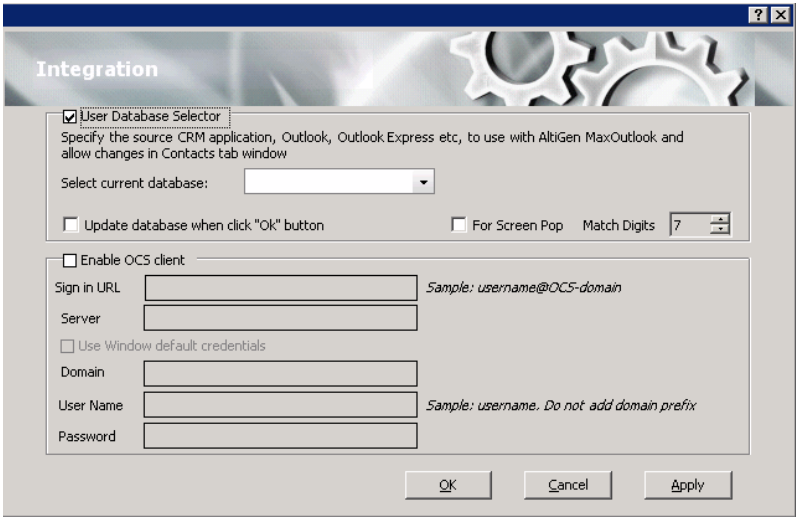


You can choose to play your messages on your phone set, or play them on your sound card and speakers. If you choose to play them on your sound card, you can have the message play as it downloads, or you can download it completely and play it on an external media player.

CRM Integration

MaxOutlook can access phone numbers from your Microsoft Outlook 2003 or Outlook 2007 CRM database.

Configure CRM integration in the Configuration window's **Integration** screen:



Use Database Selector—Check this check box to allow integration of your company's Microsoft Outlook CRM database with your MaxOutlook. When this operation is complete, contacts in the Microsoft Outlook database will appear on your MaxOutlook **Contacts** tab.

Update database when click "OK" button—When you check this check box, MAX Communication Server refreshes the data MaxOutlook accesses from the database.

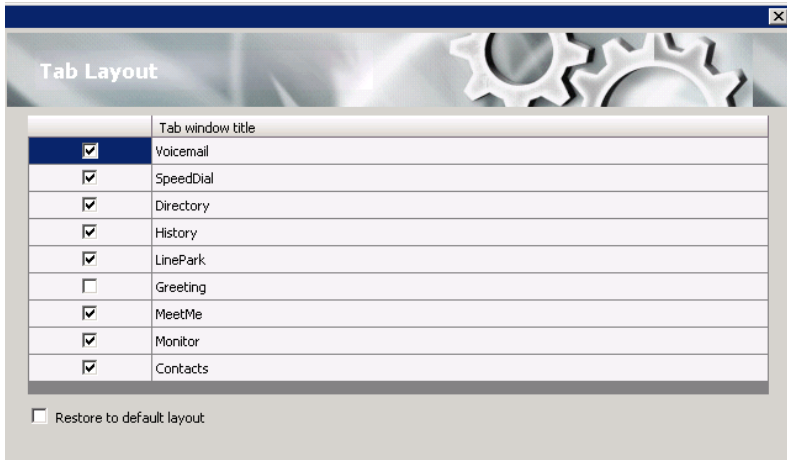
Note: MAX Communication Server will load all the subfolders and data in your main Microsoft Outlook **Contacts** folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

For Screen Pop—Select this check box if you want the Microsoft Outlook contact window to pop up when you receive a call from someone for whom you have a record in the Outlook contact directory.

Match Digits—Select the number of digits to match for caller ID. Matching starts from right and moves left. This option is for calls that go through IP and for international calls that have a digit prepended, like 0. For example, if you choose 7 (the default) in the Match Digits field, and the number is 10.10.10.6- 915102529712, MaxOutlook would match the last 7 digits, or 2529712, to identify the caller for you.

Tab Layout

You can choose which tabs you want to display in MaxOutlook by right-clicking in the space to the right of the tabs in the main window and selecting the tabs you want to show. When no tabs are displayed in the main window, you can click **Voicemail** (which displays the **Voicemail** tab). Or you can configure the tabs in the Configuration window's **Customization > Tab Layout** screen.

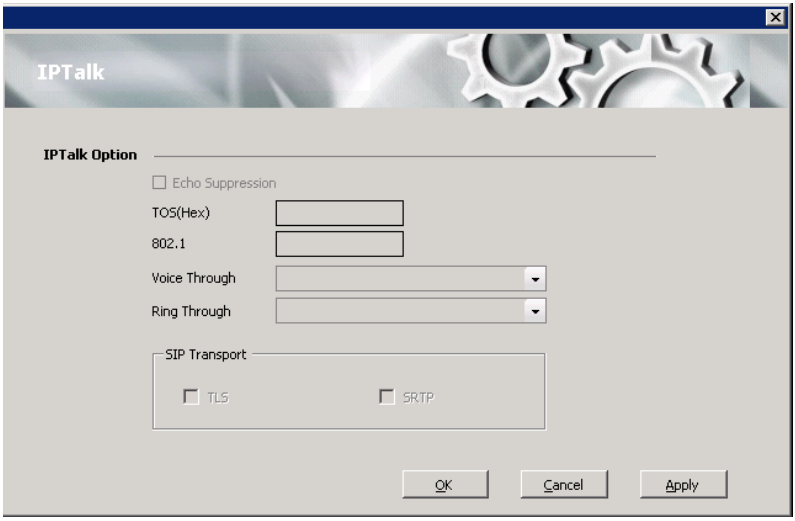


Check the tabs you want to display in MaxOutlook, and click **OK**.

To restore all call control buttons and tabs to the default settings, check **Restore to default layout**, and click **OK**.

IPTalk

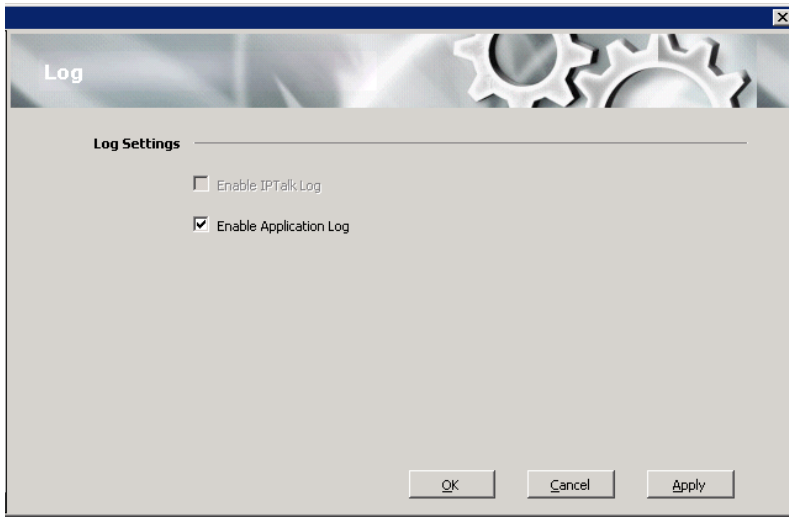
If you're using IPTalk, set the options in the **IPTalk** configuration screen:



- **Echo Suppression**—Check this check box if you are experiencing echo.
- **ToS(Hex)**—The ToS byte indicates the type of service. For IPTalk, you need high priority service, and the default of “0” set here indicates high priority service. However, if your company router supports DSCP EF, then set this field to “A0”. The ToS value is gateway-based. For guidance, see your system administrator.
- **802.1**—This setting is related to the priority given to voice packets traversing your network. For guidance on setting this value, see your system administrator.
- From the **Voice Through** drop-down list, choose the sound card that will carry the incoming and outgoing voice. It could be a sound card in your PC, or it could be a USB-based sound card in your headset system.
- From the **Ring Through** drop-down list, choose the device that will carry the incoming ring. When you’re away from your desk, you may prefer the ring to come through your PC speakers, rather than your headset system.
- SIP Transport—These settings secure the SIP signaling messages and the RTP. SIP signaling is secured using transport layer security (TLS). RTP or SIP-associated media is secured using the secure RTP (SRTP) protocol. For guidance with these settings, see your system administrator.

Log

If you want the system to keep error logs for troubleshooting, check the appropriate box in the **Log** screen in the Configuration window. Logs are stored in your \\Documents and Settings*username*\Local Settings\Application Data\AltiGen\MaxOutlook directory.



The **Enable IPTalk Log** check box is available only if you're using IPTalk. The Application log is for MaxOutlook.

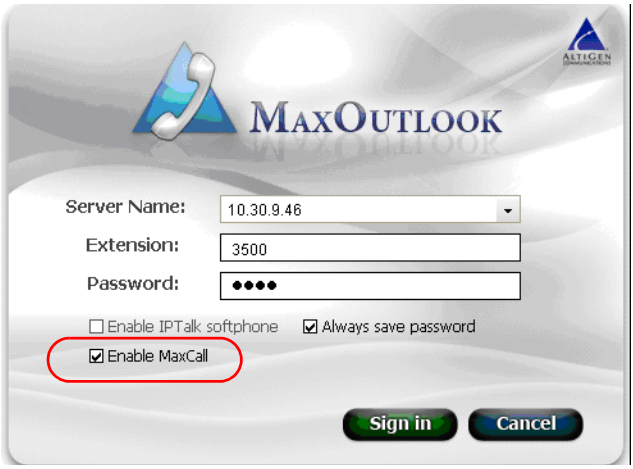
Using MaxCall

MaxCall is intended for agents involved in marketing campaigns and other campaigns where the same message must be delivered over and over. Using MaxCall, you can record scripts, called phrases. Then, when you dial a call and the other party answers, by clicking a button you can hand the call over to the MAXCS system, which then plays the phrase you selected. This frees your extension to make the next call. The feature is available on the MaxCall tab.

A MaxCall license must be assigned to your extension before you can see the MaxCall tab.

Logging in to MaxCall

When you log in to MaxOutlook, check the **Enable MaxCall** check box.



When you are logged in, the MaxCall tab is available to you.

The MaxCall Tab

The MaxCall tab looks like the following figure.

The MaxCall tab has four columns:

- **Phrase**—List of phrases, or scripts, that you have recorded. These are stored on the MAXCS server.
- **Date**—The date the phrase was recorded or last modified.
- **Duration**—The duration of the phrase in hh:mm:ss format.
- **Notes**—Notes you enter about the phrase. Double-click the Notes cell to enter notes.

The drop-down list at the bottom displays campaign names and the transmit caller ID for each campaign.

Using a Phrase

1. From the **Campaign Transmit CID** drop-down list, select the campaign applicable to your call. If the callee's phone displays caller ID, his display will show the caller ID configured for this campaign instead of the actual caller ID.
2. Make a call.
3. If you get the other party's voice mail, click the **Transfer to Phrase** button. MAXCS takes control of the call and plays the selected phrase. Your phone is released so you can make another call.

Note: Instead of selecting the phrase before making a call and then clicking the **Transfer to Phrase** button, you can double-click on a phrase after the call is connected.

Recording a Phrase

To record a message to add to the phrase list,

1. Click the **Add/Review Phrase** button. The Add/Remove Phrase dialog box appears.

2. Select the **Record** button.
3. Enter a name in the **Phrase Name** text box.
4. Click the **Record** button. Your phone will ring.
5. Answer the phone and record the message.
6. Click the **Stop** button. The message is saved as a phrase on MAXCS, and MAXCS notifies you and adds the new phrase to the phrase list in MaxCall. The length of the phrase is added to the **Duration** column.

Reviewing a Phrase

To review a phrase,

1. Click the **Add/Review Phrase** button.
2. Select the **Review/Delete** button.
3. Select a phrase to review from the drop-down list.
4. To delete the phrase without listening to it, click the **Delete** button. You receive a confirmation message. The phrase is deleted from MAXCS and from the MaxCall list of phrases.
5. To review the phrase, click the **Review** button. Your phone will ring.
6. Answer the phone and listen to the phrase.
7. You can delete the phrase after listening or simply exit the dialog box.

APPENDIX A

Errors and Troubleshooting

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
MAX Communication Server connection limit has been exceeded.	No license was found OR more than allowed number of MaxCommunicator/MaxOutlook users have attempted to log on.	Maintain the number of MaxCommunicator license keys or add additional session licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to MAX Communication Server.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of MAX Communication Server (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the AltiGen Voice Mail System and is temporarily unavailable.	Wait awhile, then try again.
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on MAX Communication Server.	Make sure voice mail service is started.
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	MaxOutlook uses this dll to communicate with MAX Communication Server. It should be registered in user system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to MaxOutlook directory, type **regsver32 AlpInterface.dll**
You have entered an invalid password. Please try again.	The password is incorrect.	Enter your extension password.

Error Message	Description	Solution
Cannot use “IP Extension integrated with IPTalk.”	You tried to log in with the IP extension option without being assigned an IPTalk License.	Confirm that your extension is set up as an IP extension with dynamic IP address and that an IPTalk License has been assigned.
The version of MaxOutlook on your desktop is out of date.	The installed version of MaxOutlook does not match the version of MAX Communication Server on the system server.	Upgrade MaxOutlook to match the current running version of MAX Communication Server.

Troubleshooting IP Connectivity from a Remote Location

If problems occur connecting to your company’s MAX Communication Server from a remote location, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the MAX Communication Server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter

```
Ping <IP address> [ENTER]
```

where `<IP address>` is the MAX Communication Server system you want to connect to. An example of the IP address format is 123.234.231.143

If you do not get a response, contact your LAN administrator for support.

Also, check to verify that the necessary ports are open.

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